

Creating a Participant Assignment

Note: In order to create a participant assignment, an assignment to the case is not needed.

Although the person assignment and case assignment look the same on the eWiSACWIS outliner, the data in the assignment type is differentiated “behind the scenes.” Differentiation between a person assignment and case assignment is important when the need to track a child assigned to a particular assignment type exists (i.e. a report looking for all specific children assigned to a Permanency Consultant would require that a person assignment be created).

Note: A primary assignment cannot be given to a participant. The primary assignment must always be for a case.

From the Desktop:

1. Select the ‘Participant View’ radio button.
2. Click on the ‘View participants’ expando to view all participants for a specific case.
3. Click on the appropriate participant icon and select ‘Create Assignment’ from the Actions drop-down for the specific participant to open the Create Worker Assignment page.

The screenshot displays the eWiSACWIS interface for creating a participant assignment. At the top, there are filters for 'View by' (Case, Participant), 'Filter by' (Date restricted, Not approved/cancelled), and 'Cases: 429'. A search box contains 'aardvark'. Below this, the details for 'Aardvark, Amy B. (9222933)' are shown, including case address, primary worker, and an 'Actions' dropdown menu. A 'View participants' section lists several participants with their roles and statuses. The 'Aardvark, Abigail A., III (9226560) Case Information' section is highlighted, showing a dropdown menu with options: 'Create Assignment', 'Create Case Note', 'Create Meeting', and 'Maintain Participant Information'. The 'Create Assignment' option is highlighted in blue.

- On the Create Worker Assignment page, click on the appropriate [Select](#) hyperlink(s) of the worker(s) you want to assign the case participant to. If you do not see his/her name, go to the View By section and select 'County/State.' On the left side of the page will be a listing of all counties. Select the appropriate county and look for the name of the person you want to assign the case to. When identified, click on the [Select](#) hyperlink next to the worker's name. There is no limit as to the number of assignments you can create for a case participant.

The screenshot shows the eWiSACWIS interface for creating a worker assignment. At the top, there are browser tabs for 'eWiSACWIS' and 'Create Worker Assignment'. The main header is 'eWiSACWIS' with 'Print' and 'Help' icons. Below the header, there are 'Sort By' options for 'Name' (selected) and 'Position Title'. A 'Workers' list on the left contains various workers with 'Select' links. On the right, the 'View By' section has radio buttons for 'County/State', 'Employing Entity', 'My County', 'Site/Office', and 'Workers for Supervisor'. Below that, the 'Current Worker' section shows 'Coke, Caitlin C.' and the 'Current Worker Status' section has radio buttons for 'Close' and 'Do Not Close'. The 'Assignment Definition and Details' section at the bottom includes 'Category: Case', 'For: Aardvark, Amy', 'Participant: Abigail A. Aardvark, III' (highlighted with a red box), and 'Start Date: 06/07/2022'. There is also an unchecked checkbox for 'Emergency Protective Services Report'. A table below contains the following data:

Worker Name	Type	Responsibility	Role	
Abby, Secondary	CPS Initial Assessment	CPS Fam. Serv - Non-CO	Secondary	Delete

At the bottom right of the page, there are 'Assign' and 'Close' buttons.

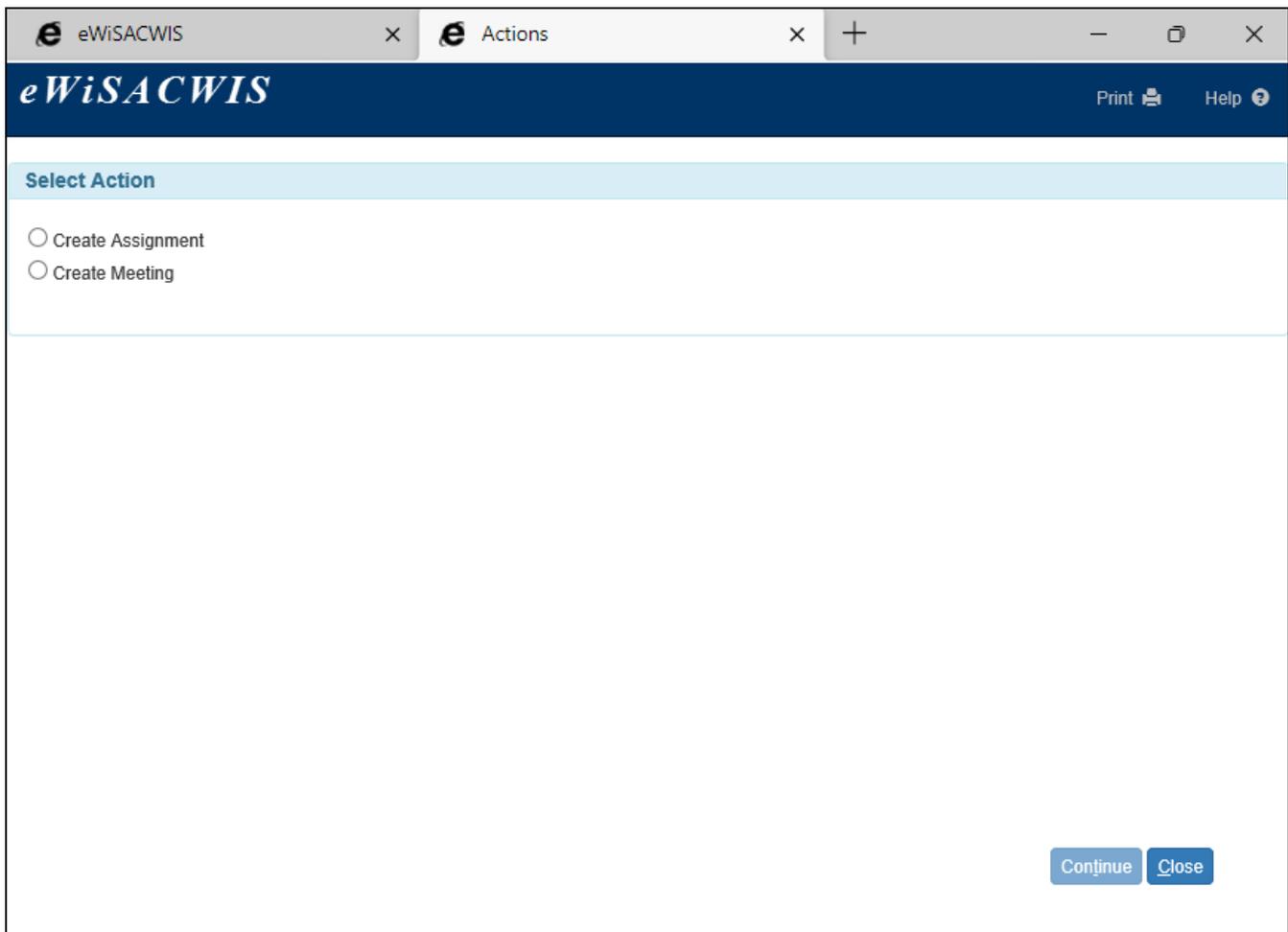
- On the bottom of the page is the Assignment Definition and Details section. Type, Responsibility, and Role are all drop-down values. Select the appropriate value for the type of case assignment to be made for each worker. Remember, there can only be one Primary Assignment.
- The Current Worker section indicates the name of the current worker assigned to the case. The Current Worker Status section relates to the assignment status of the current worker assigned to the case (this will always be Do Not Close).
- The Assignment Definition and Details section will pre-fill with the case name (For), the case participant (Participant), the date the assignment was effective for (Start Date), and the new worker assigned (Worker Name).
- Once completed, click on the Assign button. eWiSACWIS will create a new assignment and notify all people newly assigned to the case via email.

From Search:

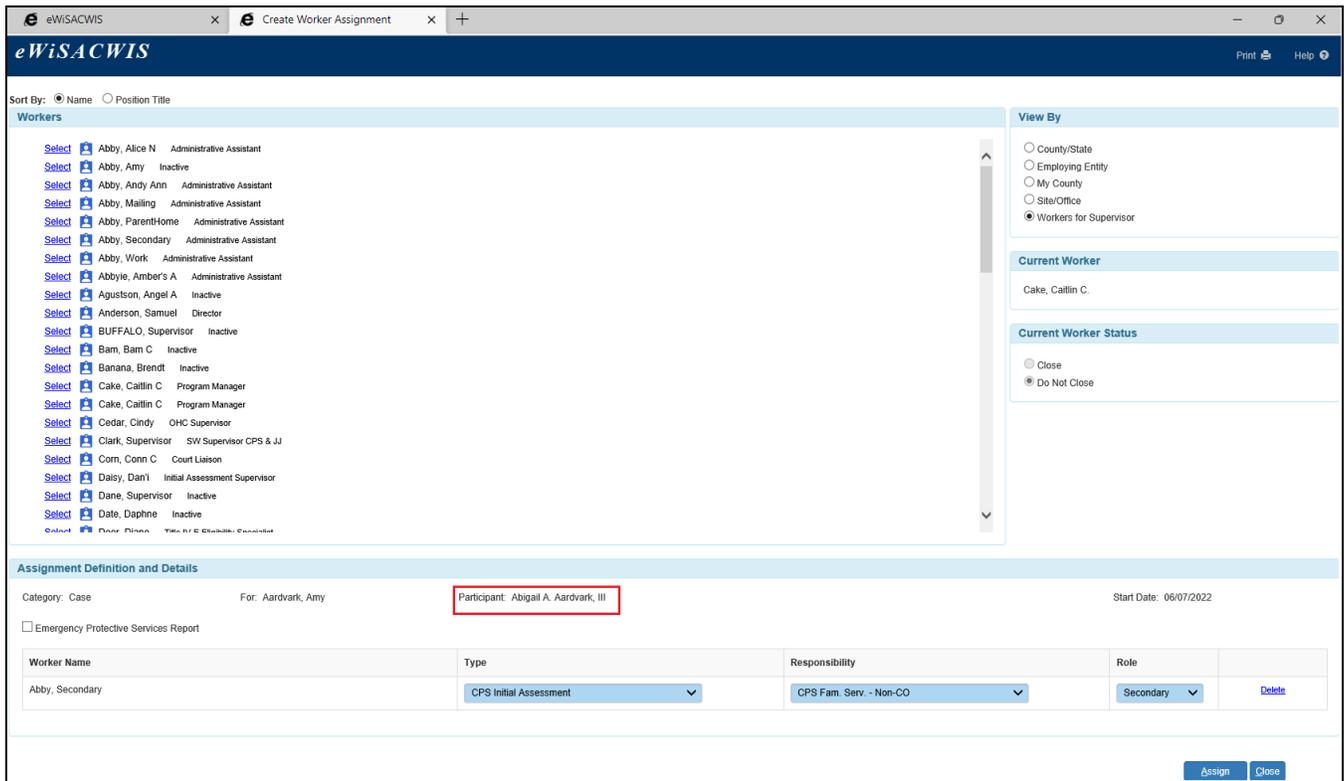
1. Enter the Last Name and First Name or Case ID.
2. Select the 'Participant View' radio button; this will automatically do a search for cases.
3. In the Cases Returned section, expand the case icon for your case.
4. Click the [Actions](#) hyperlink next to the participant you would like to create an assignment for.

The screenshot shows the eWiSACWIS search interface. At the top, there are tabs for 'Case', 'Person', 'Provider Organization', and 'Worker'. Below these is the 'Search Criteria' section with fields for Last Name, First Name, Case ID, Site, and ZIP Code. The 'Participant View' radio button is selected and circled in red. The 'Search Precision' is set to 'Med' and 'Sort By' is 'Alpha'. A 'Search' button is visible. Below the search criteria, it says 'Record 1 to 1 of 1'. The 'Cases Returned' section shows a list of cases. The first case is expanded, showing a list of participants. The 'Actions' link next to the first participant is circled in red. The list of participants includes: Administration, Adoption, Assets and Income, Assignment, Case/Permanency Plan, Child/Youth Image, Education, Eligibility, ICWA, Legal, Missing Child, Permanency Consultation, and Planning. Other cases listed include Aardvark_Adam_A., Aardvark_Amy_B., Bluebird_Bennie., and Buckeye_The.

5. On the Actions page, select the 'Create Assignment' radio button and click Continue.



6. On the Create Worker Assignment page, click on the appropriate [Select](#) hyperlink(s) of the worker(s) you want to assign the case participant to. If you do not see his/her name, go to the View By section and select 'County/State.' On the left side of the page will be a listing of all counties. Select the appropriate county and look for the name of the person you want to assign the case to. When identified, click on the [Select](#) hyperlink next to the worker's name. There is no limit as to the number of assignments you can create for a case participant.
7. On the bottom of the page is the Assignment Definition and Details section. Type, Responsibility, and Role are all drop-down values. Select the appropriate value for the type of case participant assignment to be made for each worker. Remember, there can only be one Primary Assignment.



8. The Current Worker section indicates the name of the current worker assigned to the case.
9. The Assignment Definition and Details section will pre-fill with the case name (For), the case participant (Participant), the date the assignment was effective for (Start Date) and the new worker assigned (Worker Name).
10. Once completed, click on the Assign button. eWiSACWIS will create a new assignment and notify all workers newly assigned to the case via email.